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ABSTRACT

Long-range planning is becoming increasingly important for educators in today's rapidly changing society. This bulletin accordingly presents a step-by-step model for school districts to use in developing and successfully implementing a long-range plan. Chapter 1 introduces long-range planning and suggests ways of getting district personnel involved in the planning process. Chapter 2 demonstrates how to develop a "mission statement" and uses some Oregon school districts to illustrate this process. Chapter 3 presents the details of the planning process, including demographic forecasting, goal-setting, and formulating specific objectives to meet the goals. Included are some examples of district goals in Oregon. Chapter 4 provides suggestions for launching a plan so that everybody in the district is aware of it, and chapter 5 focuses on monitoring the operation of the plan. The conclusion offers some of the reported benefits of long-range planning. Information for this bulletin was obtained from printed sources, a survey of Oregon school districts, and interviews with school officials. Appended are the survey instrument, a tabulation of the results, and a list of district plans. (TE)

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LONG-RANGE PLANNING
School Districts Prepare for the Future

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Thomas E. Hart

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OREGON SCHOOL STUDY COUNCIL
1787 Agate Street
University of Oregon
Eugene, Oregon 97403
(503) 686-5045

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Preface

Planning has always been an integral part of education. Recently, perhaps as a response to the various task force reports or because of a renewed effort to make our school programs relevant to graduates who will be entering an increasingly complex world, districts have increased their efforts to plan for periods further into the future. Planning is essential in today's rapidly changing society. The further into the future a district can make plans, the better prepared it will be for what that future will bring.

Such a long-range planning approach is the topic of this issue of the OSSC Bulletin, which integrates published information with accounts of district practices in Oregon. This Bulletin serves as an introduction to the topic for districts only vaguely familiar with long-range planning, but it also is a source of practical ideas for districts that presently use such an approach. Many of the districts mentioned in this Bulletin have expressed a willingness to share their experiences with the Bulletin's readership.

Tom Hart, an OSSC graduate research assistant, is a doctoral student in the Division of Educational Policy and Management at the University of Oregon. He has held a number of chief administrative positions in international and overseas schools.

Philip K. Piele
Executive Secretary

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Introduction

Most educators are familiar with John Goodlad's book *A Place Called School*. At the beginning of a chapter entitled "Beyond the Schools We Have," Goodlad writes:

> Futurists have a tantalizing way of describing the year 2001 as though being there has little to do with getting there. The future simply arrives full-blown. But it is the succession of days and years between now and then that will determine what life will be like. Decisions made and not made will shape the schools of tomorrow.

Living and working through the succession of days and years is what determines our personal and professional future. We can shape that future by making decisions for future action today.

Some school administrators, succumbing to time pressures, fall into the habit of working only on what needs immediate attention. This reactive approach to administration manifests itself both in dealing with current problems (when the school bus breaks down on the highway, we need to find some way to transport students to school) and future ones (when the boiler breaks down for the third time this winter, arrangements will have to be made to replace it next year). In both situations, the administrator is responding to needs as they arise.

In contrast, the proactive approach involves using predictions about the future in order to make better decisions today. A concerted effort is made to anticipate trends and events that will affect the school or district over a given period, and then actions are taken so that these events will affect the school or district in a positive way.

The proactive approach attempts to anticipate trends and needs whose seeds may already be germinating in the present but will not be visible brambles for a reactive approach for years to come. As such it takes the long view and is usually referred to as *long-range planning*. In education, long-range planning is being increasingly utilized by schools and districts . The plans may focus on one particular area, such as student achievement, sex equity, or development of computer education programs, or they may deal comprehensively with the curriculum, building plans, faculty inservice, funding, and other district concerns.

In Oregon, a number of districts are already committed to long-range planning. George Benson, superintendent of the Centennial School District, believes his district was one of the first in Oregon to utilize long-range planning. Having been involved in the process in San Diego, he described the benefits of long-range planning to the Centennial Board of Education. Project 90, the district's original plan, was approved in 1982. Today, the majority of its priorities have been implemented and a followup plan is already being developed.

Several other Oregon districts are also involved in long-range planning, and still others are considering developing plans in the near future. In this issue of the OSSC Bulletin, I present an overview of long-range planning. By acquainting districts that are already involved in the process with what others are doing, I hope to generate some cross-fertilization of ideas. In addition, by describing how the process may be developed in a district, I hope to provide guidelines for those districts in the initial stages of developing long-range plans. Finally, I suggest that long-range planning can incorporate both proactive and reactive elements and, by being so designed, can meet the needs of all members of the school community.

Chapter 1 introduces long-range planning and suggests ways that it can be initiated. Chapter 2 demonstrates how to develop a "mission statement" and uses some Oregon school districts to illustrate this process. Chapter 3 presents the details of the planning process. Suggestions for launching a plan so that everyone in the district is aware of it are made in chapter 4, and chapter 5 focuses on monitoring the operation of the plan. In the conclusion, some reported benefits of long-range planning are offered.

Information for this Bulletin was obtained from printed sources, a survey of OSSC member school districts (see Appendix A for the survey instrument, Appendix B for a tabulation of the survey results, and Appendix C for a list of districts' plans), and interviews with superintendents and other school administrators.

Chapter 1

Identifying Present Strengths and Future Needs

Students learn best when they proceed from what they have mastered to what is new. By building on the familiar, students gain the confidence necessary to deal with what lies ahead. When a school district undertakes something new, it should proceed in a similar fashion. This chapter suggests ways of getting district personnel enthusiastically involved in the planning process, assessing where the district is, and thinking about where it would like to go.

Level of Involvement

Who should be involved in the planning process? Of course, long-range planning is appropriately a responsibility of the school board and the superintendent. But who else might also be expected to participate?

In nearly all the surveyed districts that are using long-range planning, the administration and the board were responsible for their plans. Of the thirteen districts that have long-range plans, only two said they involve faculty and staff in the initial planning process. Most of the districts, however, consult with or utilize additional resources when developing and implementing their plans. These resources include administrative staff members; faculty; parents; students; professionals from the community, such as architects or maintenance specialists; and members of the general public. Each district acts in a manner that best suits its needs.

In most cases, it is advisable for districts to involve as many interested groups as possible, thereby reducing the likelihood of future complaints about being excluded from policy discussions. In addition, involving a number of diverse groups may result in a more comprehensive assessment of present and future needs.

Working from Present Strengths

When a district is considering a long-range plan, it is not unusual for administrators, teachers, students and members of the community to react in a variety of ways. Some groups or individuals might give unqualified approval to whatever is novel; others might only go along with what is recommended by the administration. Yet another group may express its displeasure at having to deal with yet another new concept, especially when, in their opinion, everything is just fine. For a district to be successful in its long-range planning, all groups must support the process. A positive first step toward achieving that goal is to elicit from all parties concerned what they consider to be the present strengths of the district.

Because people are generally loyal to what is familiar, asking them to discuss and list those things they consider "great" about their district establishes a positive attitude about the condition of the district. No one feels threatened by this exercise because it emphasizes achievements. And all interested parties—from the taxpayers (who want to be assured that their money has been well spent) to the teachers (who want to affirm that they have been doing a good job) to the students (who want to feel that they have been receiving something worthwhile)—want to believe that they are part of a successful educational system.

As the leader of the district, the superintendent is responsible for initiating the process. However, a board member, a parent, or a group of teachers or students may also play a leading role in helping a district to begin to consider what it has been doing. However it begins, the process should be organized and systematic.

The various groups can meet separately to make their assessments, using whatever format works best. For example, the board might go on a two-day retreat, the teachers might schedule an inservice day, and the students might have a congress. Following these meetings, representatives of the groups involved can meet to share their findings. At this general meeting, all suggestions should be grouped into categories, such as finance, staffing, curriculum, and so forth. Then the delegates might be asked whether there are any additional issues or needs that they feel have been omitted. These concerns could be listed separately as items that, if dealt with, would make the district even better. These concerns would serve as the starting points for the development of reactive strategies that could be added to the more numerous proactive goals to make a comprehensive long-range plan.

If a district incorporates both reactive and proactive elements into a plan, members of the community who feel strongly that there are matters that need attending to, and others who wish to ensure that the district will be preparing for future needs, will both identify with the plan but will be aware of the other's primary concern.

Looking toward the Future

The next step is for the groups to meet again and think about the future. What will it be like to live in the district in the year 2001 (or any target year)? How would they describe the area in terms of population (numbers and composition), financial base, lifestyles, interactions with and influences of neighboring areas, and national (and perhaps international) interests and importance. In short, the participants identify their hopes and fears concerning their district's future. Again, after the group meetings, representatives from each group will compare their findings and classify them into acceptable categories.

The stage for the long-range planning process has been set. Members of the district have begun to think about where schools are and about what the future holds. Although the process described in this chapter is one way to bring about this awareness, not every district presently using long-range planning does it in exactly the same way.

Chapter 2

Preliminary Considerations for a Long-Range Plan

Having established the school district's present strengths and identified some areas that could be improved, the district is now prepared to focus its efforts on developing a long-range plan. Establishing such a plan is not always easy. As a former official in the U.S. Department of Education (quoted by Bruce Perryman, 1984) said, "Planning is . . . attending to the goals we ought to be thinking about and never do, the facts we do not like to face and the questions we lack the courage to ask." Below are some questions posed by Perryman, designed to facilitate the planning process. If the answer to the second alternative listed in each question is "yes," this is an indication that the district is moving into comprehensive planning.

1. Is the planning haphazardly incomplete with everyone "planning" or is there a separate staff with clearly identified responsibilities for coordinating planning?
2. Is the planning solution-oriented or goal-oriented?
3. Is the approach a piece-meal, patchwork arrangement or is each problem viewed within the context of the whole system?
4. Do you use "seat-of-the-pants" planning or are systematic processes applied to the planning activity?
5. Are solutions to the problem the boss's (or school board's) favorite program or are several alternative solutions displayed and compared in order to make decisions?
6. Is the plan concerned only with the next year or is it long-range (strategic—say five years at minimum, 10-20 most likely) containing quantified objectives?
7. Is the planning based on the need for new funds, needs assessment, board directive to add on programs or is there a review of present activity to determine if there can be adjustments and realignment?
8. Is planning done within a fixed budget frame or are the needs of the school district with respect to program requirements the basis for

planning with financing a secondary concern?

9. Is planning a separate activity for each major program in the district or does planning start with an overall mission and objectives for the school system's total educational program?

Summarizing the above, the ideal process would be one that has a staff to coordinate it, is goal oriented, is developed with the whole system in mind, is systematic, is developed by considering alternative solutions, contains quantified objectives, can be adjusted while in operation, focuses on the needs of the district, and starts with an overall mission statement. This chapter considers the mission statement, and chapter 3 details a method for developing a plan based on the mission statement.

Developing a Mission Statement

The mission statement defines in broad terms what the district hopes to accomplish at some specified time in the future. It is the overall blueprint from which comprehensive plans can be made for moving toward the future that is envisioned. Just as the district's vision of the future was developed by representatives from various concerned groups in the district, it is particularly important that the philosophy of the mission statement be one that all segments of the community can embrace. This statement will be the basis for more specific goal-setting, timeline development, and monitoring in identified areas.

It would be ideal if the representatives of the various groups could meet to carry out this first important item of the planning process. If that is not possible, it will fall to the superintendent to compose a statement based on the information given by the groups. This would be the working document that could be presented, revised, and voted upon by the larger community.

Examples of Mission Statements

What form do such mission statements take? They range from short, broad statements about the district as a whole to a series of mini-statements about various areas that need consideration. They may be taken from the literature and modified, or they may be developed by the district. For example, the Central Linn School District and the Corvallis School District both made use of John Goodlad's statement quoted in the introduction of this Bulletin. They add to that the statement, "We can't be there without getting there." Francis Dummer, superintendent of Central Linn, amplified that statement in a letter soliciting assistance for the development of his district's plan:

> Our job is to prepare a new generation of students ready to live in the next century. There are challenges ahead that we must address. We ask that you assist us in this endeavor.

Centennial School District's Project 90 Long Range Plan contains another comprehensive type of statement:

> Our projections call for an educational system in the 1990's that focuses on aiding students to develop abilities and characteristics which will enable them to live successfully in a different era. These include creativity, copability, independence, risk taking, appropriate proficiencies in the basic skills, a sound knowledge base, and a sensitivity and concern for others.

Superintendent Tom Wogaman, in his Report on Futures Planning Progress to the Corvallis Board of Education, included nine "Implications for the Mission of Education." Among the implications cited were the following:

> We must equip students with the skills and attitudes to be self responsible . . . communicating, thinking, analyzing, problem-solving, relating to other persons.
>
> We must equip students for handling change . . . in the world and in their own circumstances.
>
> We must equip students for handling stress . . . .
>
> We must equip students for the employment world . . . .
>
> We must equip students to appreciate and deal with ethnic and cultural diversity . . . .

Crook County School District developed four mission statements dealing with instructional programs, staff development, school/parent/community relations, and resource utilization.

A general statement can be a part of a comprehensive statement that also deals with specific areas. When the Lincoln County School District's Board of Directors issued its Mission Statement and Goals, the following general statement preceded the specific statements:

> We believe our ultimate task is to prepare children to master the challenges of an uncertain future. The importance of such a task requires that our schools be truly committed to excellence. Determined to succeed and united by clear and common purpose, we will create exemplary schools, a task worthy of our best efforts.

No matter what form the mission statement takes, it serves as a guide for setting more specific goals and judging their appropriateness. Because the statement guides the development of the specifics of the long-range plan, it is not redundant to emphasize the importance of getting as many of the district's groups involved as is practical.

Chapter 3

Developing the Plan

The activities described in the first two chapters serve as the foundation for the actual planning process. Now this chapter considers the details of developing the long-range plan, using as examples several plans developed by Oregon districts.

Represented graphically, the entire planning process might be visualized as in figure 1.

Figure 1
The Planning Process

Mission Statement

Long-Range Plan

1. How to meet future needs

The Present — The Future

2. How to improve upon present conditions

An assessment of the present (discussed in chapter 1) is used to predict the future needs of the district. The mission statement (discussed in chapter 2) serves as the focus for the development of a long-range plan, which consists of two elements. One deals with what must be accomplished to move the district from the present to the future. The other specifies how to correct or improve upon present conditions so that they do not become obstacles to development. Because a long-range plan is the final product, improvement of the present should be undertaken with the long-term view in mind.

Demographic Forecasting

For many districts, demographic studies are the first steps used to ascertain future probabilities. Shifts in population size and distribution (by geographic area, socioeconomic position, and so forth) may ultimately determine whether the district should plan for growth or decline, or whether it should develop projects to serve special needs.

Jerry McClain (1987), deputy superintendent for planning with the Indian Prairie Community Unit School District in Naperville, Illinois, describes the enrollment projection procedures used by that district, located in a quickly growing area near Chicago. The district's Cohort Retention Ratio, developed by the Illinois Schools Consulting Service, uses the most recent four years of enrollment statistics. In addition, the district uses two other tables, one based on the four most recent years of growth and the other on the highest four consecutive peak years. All figures are used in a formula that projects enrollment.

To gain insight into future growth patterns in the district, McClain (or another member of his unit) attends meetings of the local planning commissions and periodically drives through the district actually counting new housing units that are occupied or under construction. He also tracks the number of vacant lots available for building. This information allows adjustments to be made in the formula to increase its accuracy.

Billie Blair (1985) describes the development of a forecasting model for the San Diego Unified School District. He advises taking basic forecasting methods, such as Cohort-Survival, Percentage Survival, or Graphi-Technique, selecting what is suitable from them, and then combining these elements with particular considerations that are peculiar to the district doing the analysis. These might be birthrate analysis or housing growth analysis. But even when a model is developed that seems to be accurate, ongoing adjustments will always be necessary to keep the rate of error as low as possible (2 percent maximum). Whatever a district's size, it should use more than one method and then devise a comprehensive network of feedback and cross-checks to provide accurate annual school-by-school forecasts.

Blair concludes with a statement that emphasizes the importance of subjective input:

> What has not been obvious, but which is of particular concern to larger districts, is the need to employ other methods in addition to their formal models. The work at San Diego Unified School District has shown that only when systematized, subjective processes are added, will forecasts begin to assume a greater degree of accuracy on an annual basis and a greater degree of precision on a year-to-year basis.

In Oregon, some school districts carry out their own demographic planning and utilize methodology similar to that of McClain and Blair. In Beaverton, for example, Joygate Pahl is the demographic specialist responsible for analyzing data that can be used by the district to determine budgeting, staffing needs, or

facility development. She obtains her information from a variety of sources: the Population Center in Portland, consultations with various citizens committees, and even house-to-house surveys. Applying a formula developed for the district, Joygate combines the Population Center's ten-year projections (which, they caution, should be considered rough estimates) with her own data to produce a three-year projection. Because no district is static, she admits that the factors involved need continual updating. Beaverton's method is quite accurate, however, having been only 1.06 percent at variance with the actual overall data between 1978 and 1986.

From the material presented above, it is obvious that numerous approaches are available for demographic studies, and each district must determine which is most suitable for its specific needs. The OSSC also provides some assistance in the form of a computerized enrollment forecasting service coordinated by Philip Piele, executive secretary. Using a district's enrollment data from past years, projections are made as to what the present and future years' enrollments should be. Using the computer program's projected figure for the present year, and comparing it with the actual figure, the district can decide whether the method is applicable to its particular situation.

With the widespread use of microcomputers and the development of sophisticated software, projections could be made by a district's own trained personnel using programs developed for this purpose. Marvin Bryan (1987) reviews "Forecast Pro," a forecasting program developed by Business Forecast Systems, Inc. for the IBM or compatible computers. Bryan claims it is "a forecasting program that will provide reliable results for a beginner who knows nothing about statistics, but which also offers advanced features that will delight the professional forecaster." This or similar programs might provide relatively inexpensive ($495) aids to demographic analysis.

If demographic data are derived as part of a larger planning process that also includes group exercises such as those described in chapter 1, those who coordinate the process should be sensitive to the appropriate time for sharing the data with the groups. If the data are presented prematurely, participants may not feel free to express their ideas because of a fear of being shown "wrong" by the data. The object of the "vision of the future" exercise is to have members offer what they believe is going to happen, and their opinions should be based on their daily experience, perceptions, and sources of knowledge. As mentioned above, these opinions may be the elusive and subjective "other factors" that have a bearing on the validity of the hard data. Scheduling the group activities before publication of such a study will place no constraints on the group's creativity and may provide insights that suggest the data should be modified.

The Goal-Setting Process

As we saw in the previous chapter, the mission statement provides the focus for the long-range plan. The demographic study provides information

about trends in the district. The next step is to use both of these items to establish goals for the district. There are a number of approaches to goal-setting, and a district must choose the one that best utilizes the expertise it has available.

Edward Lakey and Judy Hummel (1984) describe a two- to three-day goal-setting workshop used in the Kanawha County Schools, Charleston, West Virginia. This method achieves maximum involvement and is highly recommended especially when most of the participants are unfamiliar with the goal-setting process.

> The workshop . . . provides the opportunity for different constituencies of the school system to engage in a variety of activities which will allow individuals to define their views of services, problems and needs, individual goals, and long-range goals for the school system. It will also help clarify and foster a working relationship between the Board of Education and the administrative staff . . . . Upon completion of two or three days of intensive exchange of ideas, each person should have a better understanding of the school system and his/her role within the organization. A part of this understanding will be clear direction concerning immediate and long-range responsibilities, duties and goals.

At the workshop, individuals respond in writing to guided questions or topics, which are then discussed in small groups. Each small group prepares a consensus statement for each item, and these are presented to the whole group for consideration. The entire group then writes a statement that is acceptable to all members. This puts into written form ideas that are contributed by all present.

For example, after participants review the present goal statements of the district, they are given the following assignment:

> Using the information you gained from the "Review Lesson" and your own experiences, please write down in goal statement form three goals you believe will meet significant needs for the Kanawha County School System. (What an opportunity!) Write each goal statement in the space below. Remember a goal must be directed toward meeting an important need that cannot be met without a collective effort. Example: Goal 1: To provide programs to meet the special needs of students.

After the participants write their goals, they meet in small groups to compare their goal statements. Similar goals are consolidated, and a list is made of all the resulting goals. Then each member classifies each goal as a "top-half"or a "bottom-half" goal based on how important he or she feels the goal is for the system. Again, participants compare their individual classification lists in the small groups, and a consensus opinion is recorded. Finally, the group sets priorities by limiting the "top-half" goals to five.

Next, in the large group, all the priority goals of all the small groups are tallied. Each participant copies the list and rates each goal on a scale from 1 to 5, 5 being the most important. Going back into small groups, each individual must next readjust his ratings for the goals so that the total points for all goals is the same for each member of the group. This figure is arbitrary (for

example, 20 or 50) but it should be the same for all participants. At least one of the goals must be assigned a rating of 5. Each member of the small group, designated by a letter, records his or her "standardized ratings" for all the goals on a chart similar to the one in figure 2.

Figure 2
Total Summary Sheet for Goal-Setting

Goal Statements	A	B	C	D	E	F	G	H	Totals	Average
1.										
2.										
3.										
etc.										

The individual ratings for each goal are totaled and averaged. Again, a standard value is decided upon for the total value of the averages of the groups, and the average values are adjusted accordingly. At least one goal should be rated 5.

All the small groups next report back to the large group where the final totals for each goal are recorded. The totals should clearly indicate the relative importance of each of the goals to the group as a whole. A rank order listing of "Final Goals" can be made, with the most highly rated one at the top. A limited number of these goals should be decided upon for further work. Generally, about five to ten can be effectively dealt with over the period of a long-range plan, though specific years may be selected for dealing with one or two goals each, while keeping the others in mind and dealing with them only indirectly.

Perhaps an effective way to generate enthusiasm for the process would be to use as starting points the visions of the groups described in chapter 1, instead of the district's present goals and objectives, which were used in the Kanawha County project. Again, it is important to involve all segments of the district. Obviously if only board members or administrators participate in the workshop, the goals arrived at will probably not represent the views of faculty or even parents.

Although the goal-setting process is well known by most administrators (at least theoretically), it is not widely applied. Many districts assign responsibility for developing goals to the board and/or the superintendent.

This reduces the likelihood that the goals will be accepted and adopted by the wider school community. If, however, all interested parties are brought into the process, broad acceptance of the goals is more likely. Then when the goals are published, they can be prefaced with a statement similar to the one that follows:

> The following goals of our school district have been derived through a group consensus process involving board members, administrators, teachers, classified employees, and the community. These people are all committed to working together to achieve these goals as part of the long-range plan being established by the district.

Some Examples of Goals

Most school districts' goal statements fall into predictable categories such as organization, curriculum, student performance, teachers, finance, and other areas of interest to the district such as community involvement, innovations, and computerization. Usually only a limited number are selected for immediate attention. In some cases the same goals are carried forward for continued action in subsequent years, and additional goals are stressed.

An example of this iterative process is the Centennial School District's long-range planning program. The original Project 90 plan, approved in 1982, had three main goal areas: curriculum, instructional delivery system, and community. A new plan is being developed that proposes seven goal areas: stable funding; curriculum/instruction; community center for community involvement; partnership with business, industry and parents; emphasis on human skills in a technological age; life-long learning; and staff development for administrators, teachers, and support staff.

For Project 90, the curriculum goal was as follows:

> To provide a broad-based K-12 curriculum which centers on a redefinition of basic skills, relevance in subject matter, individual student creativity, copability, and emphasizing the development of a positive self-image, including sensitivity and concern for others.

And this was the instructional goal:

> To prepare Centennial students for the year 2000 will require an instructional delivery system designed to utilize the following: individualized student learning styles, current educational research, current educational technology, and the teacher (as a facilitator and motivator) focusing on the humanization of the learning experience.

The revised goal for curriculum/instruction now under consideration is:

> [To] provide a flexible, responsive, integrated educational program with emphasis on basic skills as well as life long learning skills.

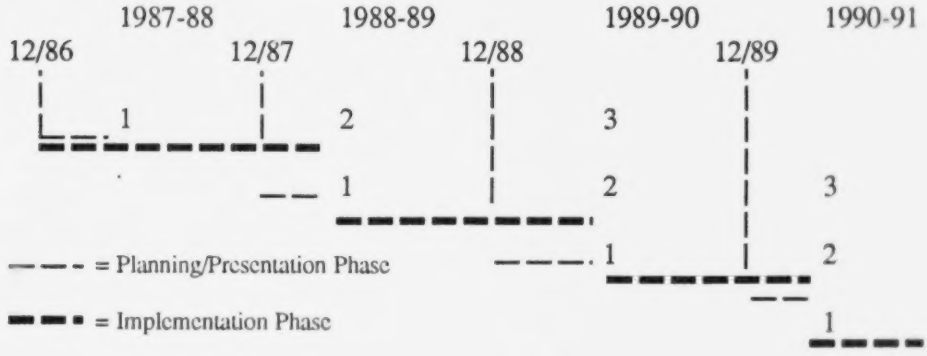
Superintendent George Benson believes that "the majority of the priorities

identified in Project 90 have been implemented." He points out that "the new plan that is being developed will piggyback onto the original." In fact, the planning cycle of the earlier project required that a new planning team be formed, and that team is currently working on the new plan. To give an idea of the continuity of the process, the following excerpt is provided from a memo circulated in April 1987 by the committee to the staff, school board members, and local school committee members.

> The District's Long Range Planning Committee composed of teachers, administrators, a school board member, and local school committee members, have been meeting monthly for the past two years to develop a visionary plan which will guide Centennial School District to 1995.
>
> Last Spring teachers were surveyed to gain broad-based participation in the preparation of the plan. At this point the committee believes that staff members should have an additional opportunity to provide input on the content to be included in the plan.

This provision for continuity between plans is important, because goals need to be fine tuned after actual implementation. In the Corvallis School District, goals were established in various areas and were expanded over a three-year cycle. For example, in the area of recruitment, in the first year, the goal is to "analyze and expand present recruiting processes and sources of candidates." In the second year, the goal is to "expand and refine recruitment activities and procedures." And in the third year, it is to "evaluate results of recruitment activities." Furthermore, the entire plan is developed on a "roll-over" technique, whereby at the end of year one, the year two goals are established as year one goals for a "new" three-year plan. The process is illustrated in figure 3.

Figure 3
"Roll-over" Cycle of Three-Year Plan, Corvallis School District



Some additional examples of goal statements from other school districts are given below, using curriculum/instruction as a common ground for comparison.

For the Education Service District of Washington County:

> Improvement of instruction, with emphasis on curriculum development in basic skills (including science and social studies), staff development, use of technology, and innovative programs.

For Crook County School District:

> Provide a curriculum and instructional program that provides for exceptional children. Exceptional children includes Talented and Gifted, Special Education students as well as Students at Risk.

For Nyssa School District:

> To provide curriculum materials which will promote and supplement quality instruction that will allow each student to progress to his/her fullest potential.

For Lincoln County School District:

> Promote instructional and academic excellence at all levels of the Lincoln County School District.

The special concerns of each particular community are expressed in its goal statements, even in areas that are common to a number of districts. More specialized goals are developed in areas that may not be common to all districts, such as vocational education, human relations, or technology. Of utmost importance, however, is ensuring that members of the district can identify with, support, and promote the goals. Familiarity with the goals of other districts can stimulate thinking about what is needed in one's own district, but the goals of other districts should serve as a guide, not something to be imitated. The prioritization process explained earlier in this chapter may facilitate districts' awareness of their needs.

Formulating Objectives toward the Goals

Unlike goals, which give a general direction to the mission statement, objectives are the specific, precise elements that drive the plan. As such, each objective

> lends itself to measurement and quantifies/qualifies how much, how long, how well some specified activity will be pursued. In order to be measurable, however, an objective must be phrased correctly. It should specify an outcome or product, a level of achievement (criteria, standards, or indicators of performance level), and the circumstances under which evaluation will take place. The objectives may also include a date by which it will be completed, the person or group responsible for completion, and a rationale. (American Association of School Administrators)

Because of the specific nature of objectives, many districts delegate the responsibility for writing objectives to those who are considered "experts." Thus, a goal dealing with finance might be given to the superintendent and the board to develop objectives. Likewise, responsibility for writing objectives for the curriculum goal would be delegated to the principals and the faculty. Although this approach certainly has its merits and may prove to be the most efficient, it does exclude the other sectors of the district, and, consequently, runs the risk that some objectives will not have full support when the plan is implemented.

An alternative is to use essentially the same process as was employed for setting the goals. All groups within the district would thereby participate in formulating the objectives. Additional expertise can be provided to the groups as required. If the plan is truly intended to be used by the whole district, efforts must be made to ensure that every member of the community will be able to understand it fully. Esoteric language or jargon should be avoided or adequately explained.

If the whole-group participatory method is used, a separate workshop should be scheduled for each goal in the plan. Because some participants may not have had much experience in writing objectives, a prework session should be offered explaining what objectives are and how they can be used to stimulate action that will ensure the realization of the goal. After all members understand what must be done, the goal statement under discussion that day is distributed and each participant is asked to develop as many objectives as he or she can that will assist in the realization of that goal.

Next, the small groups convene, comparing and, when appropriate, combining the objectives. Objectives may be grouped by subject headings (such as instruction, finance, facilities). Again, a limit on the number of items to be reported to the whole group could be set, but it is probably useful to allow all contributions to be shared. Some approximate deadlines should be marked into the objectives to facilitate the later coordination of all of the objectives. Each objective that is agreed upon will be listed under its goal statement, along with the person or agency who will be responsible for its realization, as well as suggested dates for completion of specific activities related to achieving the objective.

For example, if the goal being discussed is improvement of curriculum, then the format might resemble that depicted in table 1.

After this exercise is completed for all the goals, the final step is preparation of a comprehensive timeline to ensure that there are no busy clusters of time that involve the same people. Adjustments might have to be made if, after consultation with those involved, it is determined that therewould be difficulty in completing tasks as assigned. Again, the emphasis is on a spirit of cooperation so that the whole district is working together for the mutual realization of the goals.

This step completes the written document, which can now be implemented.

Table 1
Format for Presenting Goal, Objectives, Activities, Agents, and Timelines

Goal #1. Improvement of instruction, with emphasis on curriculum development in basic skills

Objectives	*Activity*	*Agent*	*Timeline*
1. Increase the efficiency of of the review process through reduced handling of evaluation and catalog data	1.1 Examine micro-based software for integrating preview date	Curriculum Coordinator	1/88
	1.2 Prepare a cost benefit analysis for future implementation	Finance Office	2/88

(Excerpted from the Superintendent's Report to the Washington County Education Service District Board of Directors, November 17, 1987)

Chapter 4

Launching the Plan

Once the long-range plan is completed, it is presented to the board for approval. Assuming that the board has been actively involved in developing the plan, the final document should contain no surprises. Some members of the board or citizens who were not involved in the process, however, might have legitimate queries that should be addressed. If few or no alterations are necessary, the document can then be authorized by the board for implementation.

The next step, publicizing the plan, is especially important for the general public. Although members of the community were probably aware of the planning process, they may have heard conflicting viewpoints concerning the content of the plan from those involved in the process. Making the document available gives everyone an opportunity to see what has been achieved, and they will feel involved by monitoring the implementation of the plan.

Although a printed and bound document, complete with photographs, charts, and some data, may be impressive, the important thing is the message that the district has a plan and will be following it. Therefore, a simple photocopied document may be preferable to a "professional" document that does not become available until well after the plan has been put into practice.

The members of the planning group have already committed themselves to assisting with publicizing the plan, and this might entail soliciting more support from members of the district who are not yet involved. One way of eliciting such support is a cover letter sent to selected members of the community. The letter sent by Central Linn School District invites citizens to serve on a committee to advise the district on long-range planning issues.

> At a recent meeting of the Central Linn Board of Education, your name was submitted to be asked to serve on a Central Linn Vision Committee to serve as an advisory committee to the Board on long range planning issues of the district. Enclosed find the name, mission statement, goals, tasks, timeline and membership areas for the committee. Please review this document and indicate on the enclosed post card if you are able to serve on this committee and put the card in the mail by [date].
>
> Thank you for your consideration of our request to serve your community.

Another even more effective means of acquainting the community with the plan would be to follow the example of corporations when they promote new product lines. To publicize a new product, a company may stage a lavish reception, displaying the product along with data testifying to its merits. Knowledgeable personnel are usually available to discuss the product, and sometimes videos about the product may be viewed in the reception area.

Few school districts could afford a presentation as lavish as that of Xerox or Wang, but even a modest reception would serve to inform the members of the district (both those who will be involved in the plan's operation and those who will be affected by it) of what it entails. An evening reception, preferably at a downtown site, will make it easier for people to attend. Displays of the district's present and future planned situations—photographs of the buildings, graphic displays of enrollment statistics, maps, and so forth—enable those in attendance to visualize the benefits that will derive from the plan's implementation. Video programs are effective in highlighting key district programs such as student activities (sports events, dramatic presentations, and so forth).

After the guests have had some time to view the exhibits, there should be an opening address by the chairman of the board and a supporting address by the superintendent. Key members of the planning group should be identified and recognized.

Copies of the plan should be available for distribution, and a brief overview presented. There could also be an appeal for additional participation in actualizing the plan, depending upon the goals that have been identified. Individuals could be invited to contribute additional ideas for realizing the objectives or asked to assist in monitoring the implementation. Tables could be set up, each displaying information about one goal, so that after the formal presentations those who are interested could become better acquainted with the plan.

Materials exhibited at the reception can later be displayed at the district's central office and circulated among the schools. This visual reminder of the plan will assist in maintaining awareness and enthusiasm.

The plan has been launched. A year or more of hard work is behind the district. Five years or more of hard work lie ahead. One ongoing task will be to monitor progress toward the plan's implementation, the subject of the next chapter.

Chapter 5

Monitoring the Plan's Operation

Even the best formulated and publicized plans are likely to be shelved and rarely referred to unless some mechanism ensures that the plan is being carried out. This chapter suggests ways of monitoring implementation through participant-generated reports and careful supervision; it also outlines means of receiving feedback for fine-tuning and ongoing improvements.

Many districts that have long-range plans indicate that with the exception of the superintendent's periodic reports to the board, there is little formal monitoring that takes place once the plan is operational. The exception to this is when the objective relates to finance; this usually merits a monthly update from the relevant department to the superintendent.

Feedback Mechanisms

Some OSSC members indicate that they do have formal feedback mechanisms. In Fern Ridge, timelines are established and teachers report to the superintendent. There are opportunities to do this at monthly breakfast meetings or when the superintendent visits schools during the day. Crook County uses a variety of procedures depending on the project, including "input sessions with the administration," public hearings, and newspaper coverage to inform the public. In Medford, the faculty committee meets once a month, and the administration periodically checks with staff on staff development and curriculum.

Following is a suggested procedure that can be used to more formally assess a plan's progress. At predetermined intervals throughout the plan's implementation, the "agents" (as identified in table 1) report back to the group or person responsible for coordinating the plan about progress toward realizing the objectives. About ten days before each report is due, the coordinator should send a reminder to those involved, clearly stating the guidelines that indicate the completion of a task.

If the plan is complex, involving many objectives, personnel, and checkpoints, it would probably be advisable to make use of the district's computers for monitoring. In the District of Columbia, administrators found that the manual process was time-consuming and difficult to manage. J. Weldon Greene and his colleagues (1985) report that they

> created an automated system facilitated by a computer data base system. The format . . . included the plan components: the intermediate objective number, responsible unit, planned end date, revised end date, actual end date, status code, critical task number, critical task and comments. Using . . . [the system] . . . office personnel entered the status (completed, on schedule, behind schedule, delayed, etc.) of each critical task.

The advantage of the system is that it allows for revisions with minor adjustments and can produce lists of goals, objectives, responsible individuals and their tasks, tasks that are behind schedule, and so forth. The coordinating individual or group could then make adjustments in the timeline if, for example, a number of tasks were behind schedule and the printout showed that one group or individual was responsible. Remedial action could be taken to relieve that individual of some responsibilities if he or she is overburdened or to provide them with additional assistance. Units that are ahead of schedule could be sent congratulatory notes about their work.

If the plan is not very complex, monitoring could be done manually. Without the aid of computers, however, progress reports probably could not be generated as quickly or distributed to everyone involved with all the specific objectives. Periodically, reports should be distributed throughout the district, or at least to the board. This may require hiring temporary clerical assistance or granting some teachers released time to attend to additional duties.

Modification of the Plan

As the plan is evolving and being monitored in its operation, there should be provision for feedback and modification. This could obviously apply to the timeline, but it could also apply to the objectives. Fern Ridge Superintendent Leslie Wolfe considers the adjustment of the completion dates a normal feature of timelines, as staff members may not realize how much work is involved and may be placing undue demands on themselves. He expects that the timeline will be followed according to schedule, but there can be renegotiation when necessary.

If an objective initially seems theoretically sound and later proves difficult or impossible to achieve, it should be revised or eliminated. A suggestion to that effect could be given to the coordinating body by the agents responsible for its implementation. The board would be advised and a note made of the change in the periodic information given to the district.

At the end of the first year of operation, an exhaustive evaluation should be made, and the results distributed by the board to the community. This

would provide the basis for proceeding in subsequent years. Although this evaluation could be included in the board's annual report to the district, the plan would remain more visible if the evaluation were again publicized at a reception and the progress report distributed as a separate document.

Conclusion

This Bulletin presents a step-by-step model for districts to use in developing and successfully implementing a long-range plan. A survey of OSSC member districts revealed widespread interest among districts, many of which either already have long-range plans or are interested in initiating them. As we have seen, each district must tailor the process to suit its individual needs. All the districts already engaged in long-range planning characterized their plans as successful and believe they are deriving important benefits from them. For some, the plan confirmed the statement in the Pennsylvania Department of Education's *Long Range Planning: Developing Action Plans*:

> Overall, long-range planning is intended to be used as a management tool to help administrators and program directors to implement, monitor and evaluate programs and services.

Long-range planning is a coordinated and systematic approach to improvement. It is not a quick fix that should be undertaken by districts experiencing difficulties. Through its long-range plan, a district sets itself on a course to provide the educational services that will enable students to live and work in the world. The planning can be comprehensive (which is more inclusive but also places more demands on district resources) or it can focus on a particular need, such as sex equity, vocational education, or the like.

Because the Oregon Department of Education does not produce statewide long-range plans, as some other states do, it is the responsibility of each district to determine its approach to the future. When that approach has been developed, it must be monitored, revised, and evaluated so that all members of the district are well-informed as to what their educational system is doing.

Several superintendents reported that when the planning process was initiated, some inertia had to be overcome. But once in operation, the plan served to bring together various elements of the community.

A long-range plan can be an important means of accountability for all levels of the administration, because it provides specific criteria for evaluating performance. In the plan's written goals and objectives, the board has a clear idea of the responsibilities of the chief educational officer and can measure what he or she accomplishes over the course of the contract. This same

philosophy applies to other personnel in the system. For this reason, the objectives should be renegotiated and agreed upon when necessary. The important consideration is that the district is working toward improvement and that it has a means of assessing progress toward that goal. It can also make adjustments based on feedback and unexpected factors that may arise.

Another benefit of a long-range plan is that it gives the district a sense of stability. As one superintendent related, "Our board was new and was never involved in school planning. They thought they would develop a new plan every year. They had to be told that many things had to be ongoing and might take five years to be institutionalized. Past boards were setting ten new goals every year." Today, that same district has a long-range plan operating on a six-year cycle that corresponds to the state's textbook adoption scheme.

Although a district's leadership can never be completely proactive, a long-range plan gives leaders a more clearly defined direction. When the plan has a provision for the completion of one cycle leading to the next, a continuity develops that helps build a strong, coordinated system. When goals are identified that can be worked toward, members of the district can focus on where they are going and can note the signposts that they pass.

An appropriate closing for this Bulletin is a fable found in the preface to Robert Mager's book, *Preparing Instructional Objectives* (recounted by Perryman):

> Once upon a time a Sea Horse gathered up his seven pieces of eight and cantered out to find his fortune. Before he had travelled very far he met an Eel, who said,
>
> "Psst. Hey, bud. Where 'ya goin'?
>
> "I'm going out to find my fortune," replied the Sea Horse, proudly.
>
> "You're in luck," said the Eel. "For four pieces of eight you can have this speedy flipper, and then you'll be able to get there a lot faster.
>
> "Gee, that's swell," said the Sea Horse, and paid the money and put on the flipper and slithered off at twice the speed. Soon he came upon a Sponge who said,
>
> "Psst. Hey, Bud. Where 'ya goin'?
>
> "I'm going out to find my fortune," replied the Sea Horse.
>
> "You're in luck," said the Sponge. "For a small fee I will let you have this jet-propelled scooter so that you will be able to travel a lot faster.
>
> So the Sea Horse bought the scooter with his remaining money and went zooming through the sea five times as fast.
>
> Soon he came upon a Shark, who said,
>
> "Psst. Hey, Bud. Where 'ya goin'?
>
> "I'm going out to find my fortune," replied the Sea Horse.
>
> "You're in luck. If you'll take this short cut," said the Shark pointing to his open mouth, "you'll save yourself a lot of time.
>
> "Gee, thanks," said the Sea Horse, and zoomed off into the interior of the Shark, there to be devoured.
>
> The moral of this fable is that if you're not sure where you're going, you're liable to end up someplace else—and not even know it.

The future of school districts is out there and can be anticipated. It is up to the districts' leaders to employ the proper means to get to the future they envision.

Appendix A

Long-Range Planning Questionnaire

District: _____

Superintendent: _____

1. Has your district undertaken long-range planning in the past? If so, specify the plan(s) by years ('80-85, etc.) and titles.

2. What factor(s) in the school/community was the "trigger" that began the planning process?

3. Who were the "prime movers" of the planning process?

4. Who were directly involved in the process? (e.g., board, superintendent, teachers?)

5. In which areas are long-range plans developed? (e.g., curriculum, finance, staff development, etc.)

6. What sort of feedback or followup procedures are used to monitor or evaluate the plan?

7. What published materials were prepared and distributed to introduce or describe the plan? (If possible, send copies to the OSSC office).

8. In the opinion of the majority of people affected by the plan, how successful is/was it, and what recommendations would they offer to make it more effective?

9. Did your planning process necessitate funding? If so, how much was needed, and were resources outside the district available? Please specify the latter.

10. If your district has never undertaken long-range planning, what methods are used to update or improve the educational process in the district?

Questionnaire response prepared by: _____

Position/Title: _____ Date: _____

Mail by October 14 to: Tom Hart
Oregon School Study Council
University of Oregon
1787 Agate Street
Eugene, OR 97403

Appendix B
Summary of Responses to Questionnaire Concerning Long-Range Planning

Districts	*1. Long-Range Plan*	*2. Trigger Factor*	*3. Prime Movers*	*4. People Involved*	*5. Plan Areas*	*6. Monitoring Methods*	*7. Published Materials*	*8. Reported Degree of Success*	*9. Funding*	*10. Additional Comments Alternatives to Long-Range Planning*
Central Linn	Y	F B E	B A	B A	E D B F	S-B	L	E	P	Advisory committees for building programs
Elgin	Y	S	A B F	A B F	B O S	I	P	OK	X	Sporadic, ineffective studies
Wallowa	Y	F B C	B A	B A O	B	C	-	OK	F	
Coos County ESD	Y	C A	A	A B O	U O D	A	P	OK	P	
Gold Beach	Y	C	A	B A O	B	S-B	P	OK	D	Annual goal-setting process; monitored by committees in buildings
Medford	Y	E B	A B	B A O	C	F	L	OK	P	
Washington County ESD	Y	C	B A	B A O	C	S-B	L	V*	P	*Planning for staff needs more attention
Crook County	Y	C A	B A	B A O	C	F	L	OK	P	
Lincoln County	Y	B A	B A	B A O	C	S-B	P	OK	P	
Centennial	Y	A	A	B A O	C	F	P	OK	L P	
Fern Ridge	Y	A	A B	A S	C	F	A	-	P	
Nyssa	Y	A	B A	A B S O	C	S-B	L	V	P	
Corvallis	Y	A C	B A	B A S	C	S-B	P	OK	P	
Lake Oswego	N**									**Beginning process

Key to response codes by questions

1. Long-Range Plan
Y= Yes, Refer to following table.
N= No

2. Trigger Factors
C= Community/Board input
F= Financial Needs
E= Enrollment
B= Buildings/Facilities
S= Staff Input

3. Prime Movers
B= Board
A= Administration/Superintendent
F= Faculty

4. People Involved
B= Board
A= Administration/Superintendent
O= Outside Resource
S= Faculty/Staff

5. Plan Areas
C= Comprehensive
B= Buildings/Facilities
F= Finance
S= Staff Development
E= Enrollment
O= Other Areas
D= Demographic

6. Monitoring Methods
S-B= Superintendent Reports to Board
C= Cost Analysis
I= In Development
F= Feedback from participants

7. Published Materials
L= Letters and/or Photocopied Sheets
A= Articles/Reports in Newsletters, etc.
P= Pamphlets/Reports/Documents

8. Degree of Success
V= Very Successful
OK= Good
E= Too Early to Determine

9. Funding Source
P= Present Personnel
D= Additional District Funds
S= Funds from State
F= Funds from Federal
X= Other Sources

Appendix C
Long-Range Plans Reported by Districts

District	*Reporting Person*	*Title and Dates of Plan*
1. Central Linn	Francis H. Dummer Superintendent	1986-1988 (current)
2. Elgin	Joy Delgado Superintendent	Onward to Excellence for School Building Goals (1987) Five Year Facilities Plan
3. Wallowa	David Smyth Superintendent	Building Improvement (1981-1987) (timeline extended due to budget reductions)
4. Coos County ESD	Robert G. Work Associate Superintendent	ESD Organizational Plan (1980-85) Computer Technology Implementation Plan (1985-90) Special Education Planning by Parent Advisory Committee and Superintendent's Advisory Committee (1987-?) —currently being developed
5. Gold Beach	Joe Taber Superintendent/ Principal	Roofing of Buildings (1979-84)
6. Medford	Steve Wisley Superintendent	Currently developing a plan
7. Washington County ESD	Lee E. Christiansen Superintendent	Long Range Planning Process (A three- to five-year cycle started in 1985)
8. Crook County	Robert Wininger Superintendent	Master Plan for Buildings and Facilities (1987-88)
9. Lincoln County	John W. Erickson Superintendent	Three Year Work Plan (1986-89)
10. Centennial	George L. Benson Superintendent	Project 90 (1981) Long Range Planning Committee (1984-87)
11. Fern Ridge	Leslie G. Wolfe Superintendent	Currently developing a plan
12. Nyssa	Dennis W. Savage Superintendent	Communitywide School Appraisal (1981-87)
13. Corvallis	Thomas D. Wogaman Superintendent	Three Year Plan (1986)
14. Lake Oswego	William A. Korach Superintendent	Currently beginning an extensive organizational development effort that will include long-range planning

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Centennial School District
Central Linn School District
Coos County Education Service District
Corvallis School District
Crook County School District
Education Service District of Washington County
Fern Ridge Public Schools
Lincoln County School District
Nyssa School District

Interviews

George Benson, Superintendent, Centennial School District # 28Jt, Portland, OR. Interview October 2, 1987.

John W. Erickson, Superintendent, Lincoln County School District, Newport, OR. Interview November 25, 1987.

Lee Christiansen, Superintendent, Washington County Educational Service District, Portland, OR. Interview November 25, 1987.

Joygate Pahl, Demographic Specialist, Beaverton School District, Beaverton, OR. Interview November 11, 1987.

James Redmond, Associate Superintendent, Coos County Education Service District, Coos Bay, OR, November 25, 1987.

Dennis W. Savage, Superintendent, Nyssa School District #26, Nyssa, OR. Interview November 20, 1987.

Thomas D. Wogaman, Superintendent, Corvallis School District, Corvallis, OR. Interview October 30, 1987.

Leslie Wolfe, Superintendent, Fern Ridge Public Schools, Elmira, OR. Interview December 2, 1987.